

Slovenia Food and Drink Report Q3 2012

<https://marketpublishers.com/r/S8E5CBB17F5EN.html>

Date: June 2012

Pages: 113

Price: US\$ 1,175.00 (Single User License)

ID: S8E5CBB17F5EN

Abstracts

Includes 3 FREE quarterly updates

On account of unfavourable domestic and external conditions, we do not envisage a pick-up in Slovenia's levels of consumer confidence in the course of 2012. Ongoing deleveraging at the household and corporate level and stubbornly high unemployment (expected to rise to 12.9% by the end of 2012) mean operating conditions for many food and drink companies are still very challenging, with higher-end sectors finding things particularly tough. We have also recently downgraded Slovenia's 2012 real GDP growth forecast, expecting the economy to slip into recession.

Headline Industry Data(local currency)

2012 per capita food consumption: +0.46%; forecast compound annual growth rate (CAGR) to 2016: +1.10%

2012 alcoholic drinks value sales: +1.82%; forecast CAGR to 2016: +3.24%

2012 soft drinks value sales: +1.27%; forecast CAGR to 2016: +1.85%

2012 mass grocery retail sales: +4.39%; forecast CAGR to 2016: +5.24%

Key Company Trends

Slovenian Fruit Producers Consolidating: In February 2012, Slovenia-based fruit company Evrosad d.o.o. acquired the country's second biggest fruit company, Sadjarstvo Jeruzalem Ormož. Evrosad now has 140 new hectares (ha) of cultivated

land, taking its total land ownership to 625 hectares. The company's main produce are apples, which it distributes across Slovenia and also exported as far as Scandinavia, Russia and the Baltics.

Nectars Increases Its Stake in Fructal: A 93.73% stake in the soft drinks division of leading Slovenian brewer Pivovarna Laško was in mid-2011 sold to Serbian juice producer Nectar. The latter further increased its stake in the Slovenian company in February 2012, now being in possession of 97.79% of its equity. Nectar appears committed to the continuation of Fructal's local operations, including the modernisation of its two plants. Nectar is expected to achieve some EUR140mn in Slovenian sales.

Key Risks To Outlook

Downside Risks Prevail: We hold to our view that our forecast are at risk due to the precarious state of the country's economy and external headwinds, which is expected to dip into recessionary territory in the course of 2012. On the inflation front, we reiterate that major inflationary pressures are unlikely to build over the medium term in Slovenia, given the weak state of the domestic economy, weak domestic demand, the onset of greater fiscal austerity this year and the precarious nature of the eurozone economy.

Contents

BMI Industry View

SWOT Analysis

Slovenia Food Industry SWOT

Slovenia Drink Industry SWOT

Slovenia Mass Grocery Retail Industry SWOT

Business Environment

BMI's Core Global Industry Views

Table: BMI's Core Views

CEE Food & Drink Risk/Reward Ratings

Table: Food & Drink Risk/Reward Sub-Factor Ratings, Q312 (scores out of 10)

Table: CEE Food & Drink Risk/Reward Ratings, Q312

Slovenia's Food & Drink Business Environment Rating

Macroeconomic Outlook

Table: Slovenia – Economic Activity

Industry Forecast Scenario

Consumer Outlook

Food

Food Consumption

Table: Slovenia Food Consumption Indicators – Historical Data & Forecasts

Confectionery

Table: Confectionery

Canned And Packaged Food

Table: Canned Food

Table: Meat

Table: Jams And Jellies

Table: Pasta

Table: Snack Foods

Dairy

Table: Dairy

Drink

Alcoholic Drinks

Table: Alcoholic Drinks

Soft Drinks

Table: Soft drinks

Hot Drinks

Table: Hot Drinks

Trade

Table: Sectoral trade indicators – Export, Import and Balance Value – Historical Data and Forecasts

Mass Grocery Retail

Table: Slovenia Mass Grocery Retail – Value Sales by Format – Historical Data & Forecasts

Table: Mass Grocery Retail Sales Breakdown By Retail Format Type (% of total)

Food

Key Industry Trends And Developments

Israeli Frutarom Continues Europe Expansion

Regional and Domestic Consolidation Continues

Market Overview

Food Production

Food Consumption

Confectionery

Canned Food

Trade

Agriculture

Drink

Key Industry Trends And Developments

Leading Brewer Cutting Losses

Serbian Nectar Taking Over Slovenian Fructal

Increased Focus On Foreign Sales

Market Overview

Alcoholic Drinks

Beer

Wine

Spirits

Soft Drinks

Hot Drinks

Mass Grocery Retail

Key Industry Trends and Developments

Mercator Expanding Regionally

Croatian Agrokor Muscling In On Mercator

Tus Holding Divesting Of Its Serbian Business To Pay Debts

Market Overview

Table: Slovenia Structure of the Mass Grocery Retail Market by Number of Outlets

Table: Slovenia Structure of the mass retail grocery market by value

Table: Slovenia Estimated value of sales per outlet format (2011)

Competitive Landscape

Table: Key Players – Slovenia's Food Market, 2010

Table: Key Players – Slovenia's Drink Market, 2010

Table: Key Players – Slovenia's Mass Retail Grocery Market, 2010

Company Monitor

Food

Panvita

Perutnina Ptuj

Droga Kolinska (Atlantic Grupa)

Ljubljanske mlekarne

ETA zivilska industrija d.d.

Drink

Fructal

Coca-Cola HBC Slovenia

Pivovarna Lasko

Mass Grocery Retail

Mercator

SPAR Slovenija

Engrotus

Demographic Outlook

Table: Slovenia's Population By Age Group, 1990-2020, 1990-2020 ('000)

Table: Slovenia's Population By Age Group, 1990-2020 (% of total)

Table: Slovenia's Key Population Ratios, 1990-2020

Table: Slovenia's Rural And Urban Population, 1990-2020

BMI Risk/Reward Ratings Methodology

Table: Rewards

Table: Risks

Weighting

Table: Weighting

BMI Food & Drink Industry Glossary

Food & Drink

Mass Grocery Retail

BMI Food & Drink Forecasting & Sourcing

How We Generate Our Industry Forecasts

Sourcing

I would like to order

Product name: Slovenia Food and Drink Report Q3 2012

Product link: <https://marketpublishers.com/r/S8E5CBB17F5EN.html>

Price: US\$ 1,175.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S8E5CBB17F5EN.html>